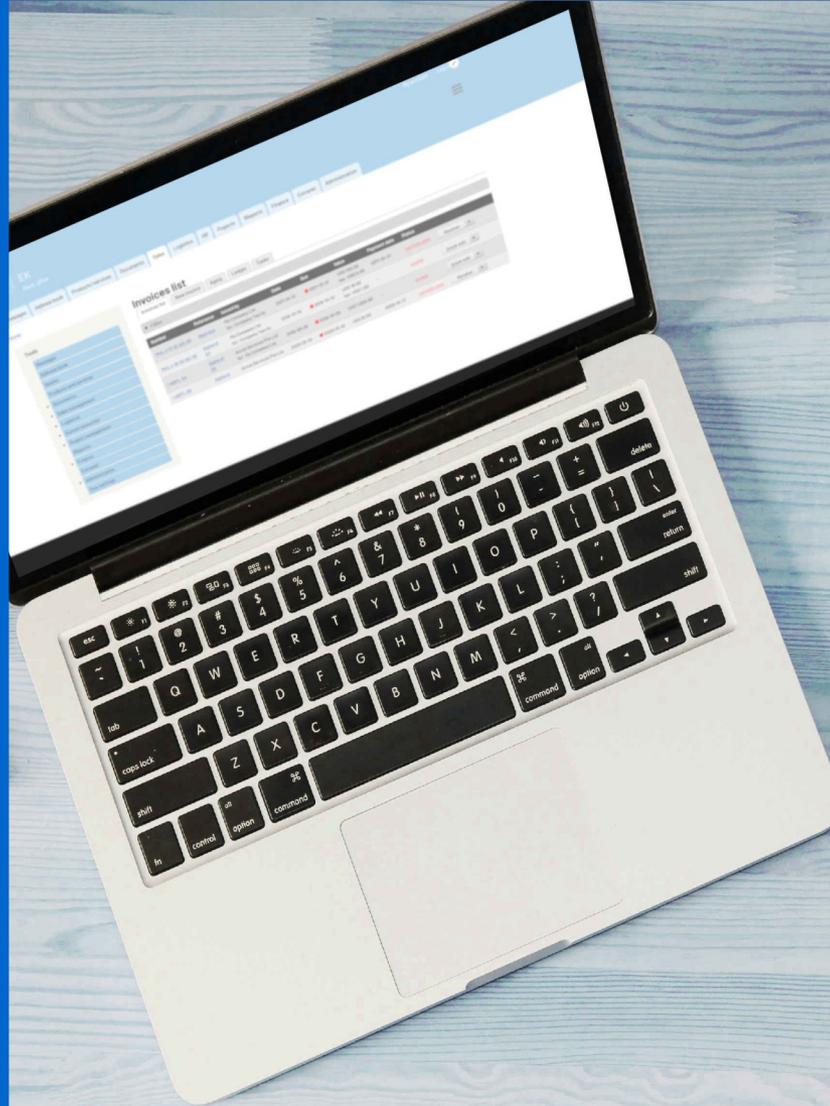


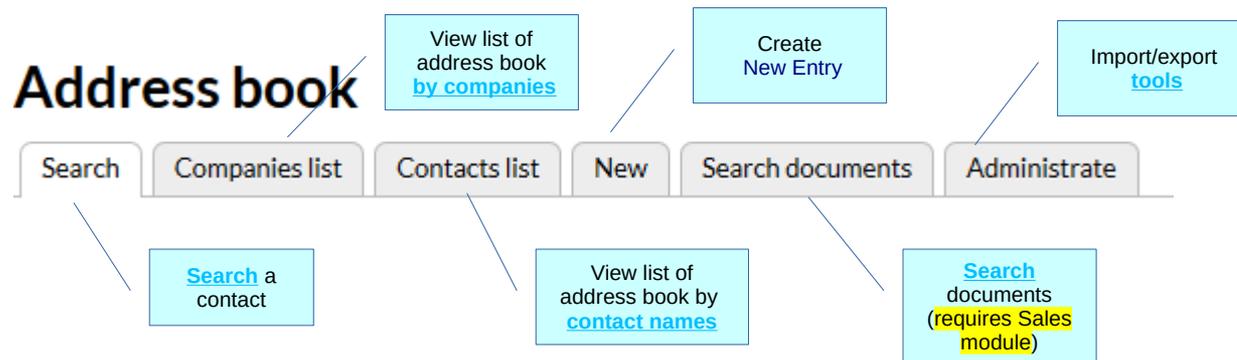
## Address book



This module keep records of contacts, clients suppliers.  
Contacts from address book are used in other modules like sales or logistics



Main address book page (/address\_book) is made of few tabs



# Address book

- Search
- Companies list
- Contacts list
- New
- Search documents
- Administrare

best

To search existing entries, simply type the key word, name and select corresponding name in the list

Filter client  Filter supplier

 Best Outlet Distribution Ltd (client)

 Best Outlet store (client)

 Best Outlet Distribution Ltd (supplier)

List display based on keyword

alp

Filter client  Filter supplier

Filter per address type

 Alpha et Omega (client)

 Alpha et Omega (client)

# Address book view

View Edit Delete Bank info Sales Documents

Search results

Create a new project with this client  
(need project module)

Click for new search

Create a project

New search

last edit 2025-04-05

Create a project

New search

Click to switch to "supplier" type

## Alpha Et Omega

AO **CLIENT** Switch supplier



Main company contact and info

Click to copy address to clipboard

### Address

Upper Floor, Gold Tower  
Money Street #5  
58318 Zong Town  
Mashchuset, New Zealand

### REG. NUMBER

abc-123

### STATUS

active

### OFFICE

Head office

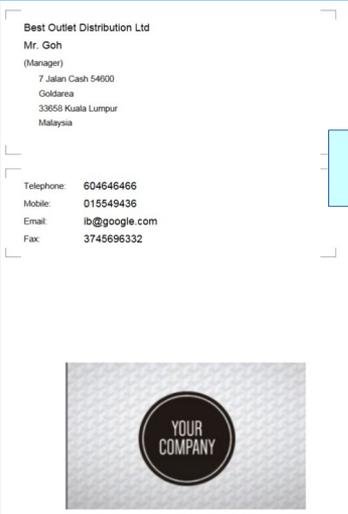
### TAGS

Export retail furniture

Click tag to search similar client

Ex. of pdf export

List of contacts details



## Name cards

+ Add contact

### MR. JOHN DEUX

Click to copy contact to clipboard

John Deux  
Purchase Director  
60355111  
6012665888  
john.foo@alphanomega.net

name card image



Export details in Pdf format

Pdf

# Edit address book

View Edit Delete Bank info Sales Documents

New entry  
Url: /new\_contact

## NAME

Alpha et Omega      AO      abc-123  
Organization name      Short name      Registration number

active  
Status

Short name is auto generated but can be changed manually

## ADDRESS

Upper floor, Gold Tower #8      Zong town      58318  
Address line 1      City      Postcode

Money street #5      Mashchauset      New Zealand  
Address line 2      State / Province      Country

## GENERAL CONTACT

989-5548551      989-5548558      www.example.com  
Telephone      Fax No.      Web site

General Tel, Fax and web

## CLASSIFICATION

client      Head office      export × retail ×  
Organization type      Organization category      manufacturing ×

Activity tags, use for classification and searches

## LOGO

Logo upload

Upload logo

Browse... No file selected.      You can input free text as comment

delete logo

## Edit address book

View Edit Delete Bank info Sales Documents

New entry

Url: /new\_contact

You must have **1 primary** contact

You can add more salutation with taxonomy

By default you can add 1 contact card. You can add more later when editing

▼ New contact card No. 1

Johanne Lee

Set as primary

Mrs. ▾

Title or function

Telephone

Mobile phone

Email address

**Upload a name card image**

No file selected.

Department or office

Social network

You can upload scanned image of namecard

You can input free text as comment

Record

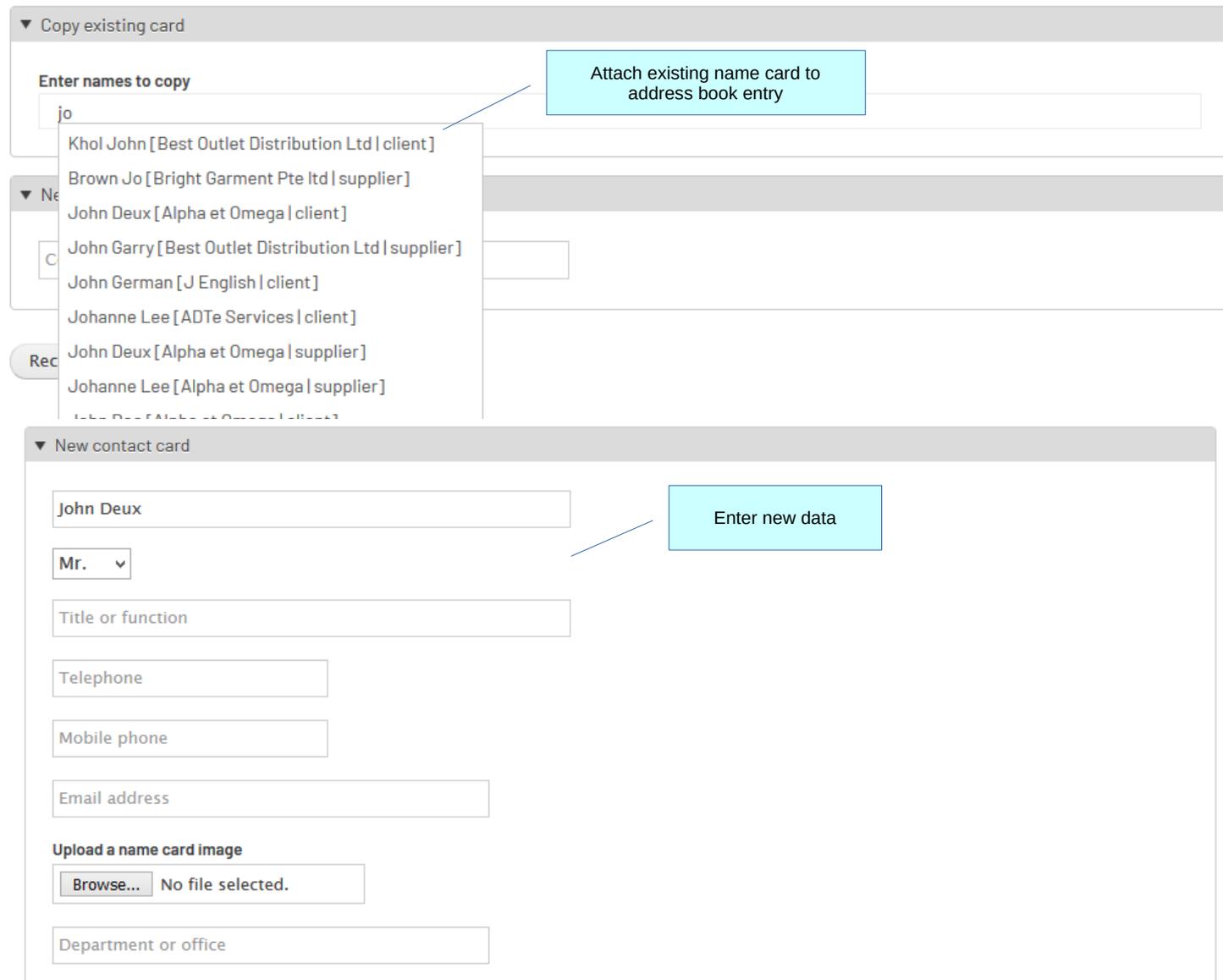
## Add new name

There are 2 options to add names to existing address book entry:

1) copy existing from another entry;

2) record a new name card

[Back to address book](#)



The screenshot displays two main sections of the software interface:

- Copy existing card:** This section has a header "Copy existing card" and a sub-header "Enter names to copy". A text input field contains the letters "jo". A dropdown menu is open below this field, listing several names with their associated roles: "Khol John [Best Outlet Distribution Ltd | client]", "Brown Jo [Bright Garment Pte ltd | supplier]", "John Deux [Alpha et Omega | client]", "John Garry [Best Outlet Distribution Ltd | supplier]", "John German [J English | client]", "Johanne Lee [ADTe Services | client]", "John Deux [Alpha et Omega | supplier]", and "Johanne Lee [Alpha et Omega | supplier]". A light blue callout box with the text "Attach existing name card to address book entry" has an arrow pointing to the dropdown menu.
- New contact card:** This section has a header "New contact card". It contains several input fields: "John Deux" (pre-filled), a dropdown menu with "Mr." selected, "Title or function", "Telephone", "Mobile phone", and "Email address". Below these is a section titled "Upload a name card image" with a "Browse..." button and the text "No file selected.". At the bottom is a "Department or office" input field. A light blue callout box with the text "Enter new data" has an arrow pointing to the "Mr." dropdown menu.

## Bank Information

When **finance module** is available, you can add bank reference info to the address book

## Edit address book

View Edit Delete Bank info Sales Documents

The screenshot displays the 'Edit address book' interface. At the top, there are navigation buttons: 'View', 'Edit', 'Delete', 'Bank info', 'Sales', and 'Documents'. The main content area is titled 'Bank information' and contains several sections:

- Edit : Bank of Bermuda**: This section contains several input fields for editing an existing record:
  - Bank of Bermuda
  - address 1
  - address 2
  - 1800-AB
  - Netherlands (dropdown menu)
  - 123458-5548
  - 5006
  - BBMNXXXX
- Edit : Biz Dev Bank**: This section is collapsed, indicated by a right-pointing arrow.
- Add new**: This section contains a single input field for adding a new record:
  - bank name

At the bottom of the form is a 'Record' button. Three light blue callout boxes with arrows point to specific elements:

- 'Existing record can be edited' points to the 'Edit : Bank of Bermuda' section.
- 'Existing record' points to the 'Edit : Biz Dev Bank' section.
- 'Add bank name to add new record' points to the 'bank name' input field.

## Bank references

Bank information per address book entry can be viewed in separate tab

- View
- Edit
- Delete
- Bank info
- Sales
- Documents

<b>Name :</b>	Bank of Bermuda
<b>Address :</b>	address 1 address 2 1800-AB Netherlands
<b>Account :</b>	123458-5548
<b>Swift :</b>	BBMNXXX
<b>bank code :</b>	5006
<b>Name :</b>	Biz Dev Bank
<b>Address :</b>	address 1 address 1 12345-6 New Zealand
<b>Account :</b>	9578845-55-61
<b>Swift :</b>	DDBNZOPXXX
<b>bank code :</b>	100

## Clone example

You can duplicate existing entry from one type to another

# Address book view

View Edit Delete Bank info Sales Documents

last edit 2025-04-06

## Tacco Stores

TESM OTHER Clone

When cloning an entry it **replicates all data of original entry under different type**. You can then edit information of the cloned entry.



## Edit address book

View Edit Delete Bank info Sales Documents

**Cloned entry**  
Data are copied

### NAME

Tacco Stores <small>Organization name</small>	TESM <small>Short name</small>	reg. number <small>registration number</small>
active		

### ADDRESS

Head Office, Kepong <small>Address line 1</small>	Kuala Lumpur <small>City</small>	52200 <small>Postcode</small>
Level 3, No 3, Jalan 7A/62A, Bandar Manjal <small>Address line 2</small>	State	Malaysia

### GENER :T

+60362875828 <small>Telephone</small>	Fax No.	Web site <small>Web site</small>
--	---------	-------------------------------------

**New Contact type**

### CLASSIFICATION

client <small>Organization type</small>	Head office <small>Organization category</small>	retail-distribution x <small>Add Tags for classification, i.e. "manufacturer"</small>
--	---	--

### Add vocabulary ☆

Home » Administration » Structure » Taxonomy

Add vocabulary with name "salutation"

Name \*

salutation

Machine name: salutation [Edit]

Description

Contact name salutation, i.e. "Mr."

Save

### salutation ☆

- List
- Edit
- Manage fields
- Manage form display
- Manage display

Home » Administration » Structure » Taxonomy » Edit *salutation*

✓ Created new vocabulary *salutation*.

You can reorganize the terms in this vocabulary, add new terms, delete terms, edit term handles, and group terms into hierarchies.

In "salutation", add items

+ Add term

### Add term ☆

Home » Administration » Structure » Taxonomy » Edit *salutation*

Add salutation title and "save"

Name \*

Doktor

Description

B I | [link] [img] | [list] [ul] | [quote] [code] | E [undo] | Normal | [source]

Doctor

Save

## Delete address book

[View](#) [Edit](#) [Delete](#) [Bank info](#) [Sales](#) [Documents](#)

 This address book entry cannot be deleted.

Used in finance, products & services, sales

[Back](#)

Address book entry cannot be deleted if used in other modules

## Delete address book

[View](#) [Edit](#) [Delete](#) [Bank info](#) [Sales](#) [Documents](#)

ADTe Services (supplier)

Confirm delete (including attached namecards)

Confirm deletion including name card attached to this entry

List of companies in address book

Search Companies list Contacts list New Search documents Administrate

Type first letters to filter by name

Ex. 'a' or 'go'

filter the list by  
keyword

Apply

name ▲	type
<a href="#">Bekalan PIT Sb</a>	Supplier
<a href="#">Best Outlet Distribution Ltd</a>	Client
<a href="#">Best Outlet Distribution Ltd</a>	Supplier
<a href="#">Best Outlet store</a>	Client
<a href="#">Blue globe</a>	Client
<a href="#">Booknote editions Ltd</a>	Supplier
<a href="#">Bright Garment Pte Ltd</a>	Supplier

Filtered result.  
Click to view address  
book data

Type of entry

List of contacts in address book

- Search
- Companies list
- Contacts list
- New
- Search documents
- Administrare

contact name ▲	salutation	title	company name
<a href="#">Daniel Thong</a>	Mr.	GM	Retail sale
<a href="#">Derrick Lan</a>	Mr.	d2	
<a href="#">Dody Boh</a>	Mr.		Retail sale
<a href="#">Donny Wilk</a>	Mr.	Executive	
<a href="#">Donny Wilk</a>	Mr.	Executive	Elpha Management
<a href="#">Fuir Loin</a>	Mr		Hurban Merlin
<a href="#">Fuir Loin</a>	-		Hurban Merlin
<a href="#">Goh Chok</a>	Ms	Manager	Best Outlet Distribution Ltd
<a href="#">Goh Kart</a>	Mr.	Manager	Best Outlet Distribution Ltd
<a href="#">Goh Wee Fast</a>	Mrs.		Goh Wee Fast
<a href="#">Ispadu Li</a>	Ms		Spritzer
<a href="#">Johanne Lee</a>	-	Director	Alpha et Omega

« first < previous 1 2 3 4 5 next > last »

Browse list pages

## Sales statistics

If **sales module** is available statistics can be viewed from address book entry

### Address book view

View Edit Delete Bank info Sales Documents

Access sales and other business data from sales, projects or report modules for this client or supplier

 (last edit 2020-04-24)

Alpha Et Omega



A0

## Sales statistics

If **sales module** is available statistics can be viewed from address book entry

## Sales data

View Edit Sales

### Alpha et Omega

Comments

[ edit ]

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum. [admin] - 2017-11-10

### Documents attached

[toggle deleted files](#)

 <a href="#">plan.xlsx</a>	project		
Select file: <input type="button" value="Browse..."/> No file selected.	<input type="text" value="comment"/>	<input type="button" value="Upload"/>	

### Projects

If project module is available

<a href="#">A-CA-6_09-BP-313</a>	SINGAPORE	2009-06-01	Deco and supply	completed
<a href="#">A-CA-6_09-BP-311</a>	SINGAPORE	2014-01-16	Project design and supply	open
<a href="#">MVL-Aa-SG-2014_11-AO-15_sub2</a>	CAMBODIA	2014-12-23	Consulting service	open
<a href="#">MVL-Aa-MY-2014_12-AO-18</a>	MALAYSIA	2014-12-23	Repair and maintenance 2	awarded
<a href="#">MVL-D-SG-2016_01-AO-120</a>	SINGAPORE	2016-01-04	New house	awarded
<a href="#">A-MVL-MY-2016_08-AO-125</a>	MALAYSIA	2016-08-18	Yuti	open
<a href="#">A-MVL-SG-2016_10-AO-126</a>	SINGAPORE	2016-10-11	New notif 2	open

### Reports

If report module is available

<a href="#">RP-2-01_16-8</a>	2016-01-06
<a href="#">RP-2-01_16-9</a>	2016-01-06

## Sales statistics

If **sales module** is available statistics can be viewed from address book entry

### Statistics

Sales or purchases data

#### Projects by status

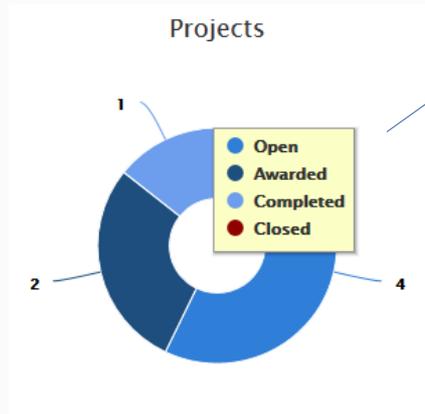
Open	Awarded	Completed	Closed
4	2	1	
			7

#### Projects by year

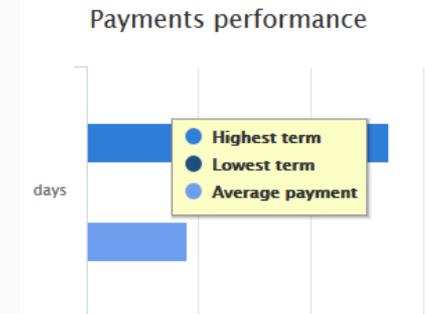
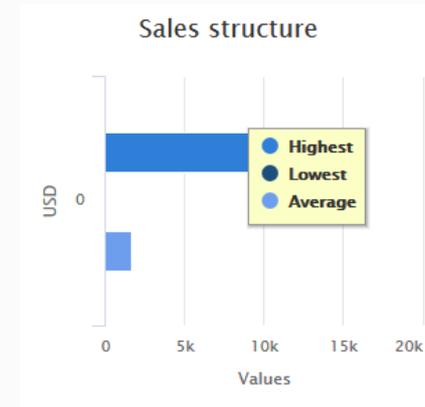
2011  
 2012  
 2013  
 2014 | General trade : 1 | Item production : 1 | Design : 1  
 2015  
 2016 | General trade : 1 | Consulting : 1 | Design : 1  
 2017

#### Sales

Total transactions : **19,751 USD**



Requires "charts" module



Sales statistics

If **sales module** is available you can store documents per address book

## Documents

View Edit Delete Bank info Sales Documents Documents tab

### Alpha et Omega

Select file:  No file selected. folder  comment   Upload new file

CONTRACT	
<a href="#">Agent agreement 2019.pdf</a>	test
IMAGE	
<a href="#">receipt1.jpg</a>	
<a href="#">computer_table_s_380.png</a>	Document not available. Please contact administrator



You can move file from one folder to another one

#### Access

By default access is given to users who have access to the address book unless custom access has been defined by owner. Use "Ctrl C" to select multiple users in the box below.

Restricted	Allowed
admin	user
user2	

## Search documents

If **sales module** there is form available to quickly search documents linked to address book

# Search documents

Search Companies list Contacts list New Search documents Administrate

Search documents in main menu

a

Type keyword

Search results

*ambc.jpg* - 2019-01-27 - 10 Kb

Indicates that the file is locked for sharing

Alpha et Omega [Folder 2]

**Agent agreement 2019.pdf** - 2019-09-23 - 3068 Kb

Link to document folder

Address book entry name

Alpha et Omega [contract]

Warning: import and export process may be critical. Make sure you have a backup before proceeding

## Address book administration

[Search](#) [Companies list](#) [Contacts list](#) [New](#) [Search documents](#) [Administrate](#)

[Import](#)

[Export](#)

There are 2 administration tasks:  
import and export

The export format is in excel.

The table extracted can be **re-used as format template** for importing of data

## Address export

Search Companies list Contacts list New Search documents Administrate

Import | Export

All types ▾

Contacts ▾

You can choose the type to export: all, clients, suppliers, others

You can choose data to export: companies or name cards contacts

The export format is in excel. You can re-use the export file structure to import new data in csv format.

Export

You have chosen to open:

 **export\_Address\_book\_contacts.xlsx**  
which is: Microsoft Excel Worksheet  
from: http://localhost

What should Firefox do with this file?

Open with LibreOffice Calc (default) ▾

Save File

Do this automatically for files like this from now on.

The import format is in csv file.  
 The excel table from export can be **re-used as format template** and saved as csv format for import

## Address import

Search Companies list Contacts list New Search documents Administrate

Import | Export

Select source \*  
 Contacts

You can choose data to import companies or name cards contacts

Select mode \*  
 Insert (add to existing)

Select mode: add or replace

, : comma  
 delimiter character

Select delimiter and enclosure characters based on you csv format

" : double quote  
 enclose character

Upload data file  
 Browse... Address\_book-8.csv

CSV format file to import

The import format should be a text csv file. You can re-use the export file structure to import new data.

Import

Example of CSV file structure created with excel table with 1 row entry

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	id	name	shortname	address	address2	postcode	city	country	telephone	fax	website	type	category	status	stamp	activity
2	1	Jolly test	JOT	address 1	address 2	J778	Juiguo7	Loopy	132	465	"	3	store	1	1970-01-01	test
3																



```
id,name,shortname,address,address2,postcode,city,country,telephone,fax,website,type,category,status,stamp,activity
1,Jolly test,JOT,address 1,address 2,J778,Juiguo7,Loopy,132,465,'"3,store,1,1970-01-01,test
```

Text file separated by commas

✓ Inserted 1 row(s)



**AREA**  
**Systems**

**EK**